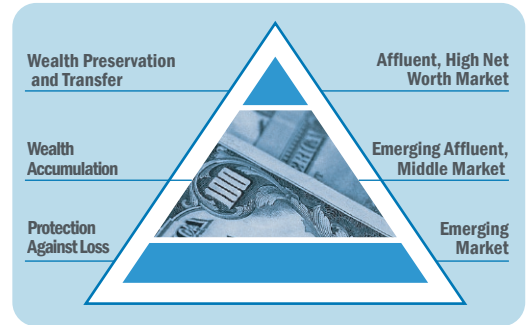


One Solution for All Clients

Use Financial Needs Analysis to promote the sale of insurance, investments and other financial products to meet the needs of your middle market and emerging-affluent clients. Financial Needs Analysis is ideal for advisors who require flexible data entry with realistic calculations focused on single need, transactional sales.



One Solution for All Markets



Analyze Basic Financial Concerns

- Saving for Education Needs
- Saving for Retirement
- Immediate & Continuing Needs for Survivors
- Disability Income Replacement
- Planning for a Long-Term Care Need
- Disability

Present Effective Solutions, Motivate Clients to Action

Present One or Multiple Needs

Create a Financial Needs Analysis presentation that focuses on one or any number of the following needs: education, retirement accumulation, survivor needs, disability, and long-term care.

Persuasive Presentations

The presentation not only motivates clients to take action, but it provides them with a savings or insurance amount that allows the client to take action.

Flexible Data Entry

Work quickly with limited client data to create a presentation from the fact finder or use Detailed Planning to enter more complete client information, yet still create the same compelling presentation.

Compare "What-if" Scenarios

Illustrate the benefits of your planning and compare hypothetical situations using the scenario comparison feature. Make a copy of the client's current situation, make a few tweaks, and you have a recommendation scenario!

The PlanLab[®] Platform

Financial Needs Analysis is fully integrated with PlanLab. PlanLab provides you with the platform you need to streamline and automate your financial sales process.

Persuasive Presentations

Financial Needs Analysis presents each financial concern using the perfect blend of analysis and graphics that inform, disturb, and motivate clients to action.

Benefits and Uses

- Engineered to accurately determine the amount of need and sell a financial solution.
- Fully evaluates a client's financial situation without spending a lot of time.
- Persuasive presentations motivate clients to action without causing objections.
- Carefully designed, intuitive fact finders capture clients' details for plans ranging from simple to more comprehensive.
- Easily model financial "what-ifs" and compare recommendation scenarios.